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ABSTRACT

This document summarizes the proceedings of a workshop on school building utilization in the 49 school districts of the Twin Cities metropolitan area (Minnesota). Included are the keynote address of Minnesota Governor Al H. Quie; statistical information on the use, location, and condition of the educational facilities of the region during fiscal year 1977-78; an analysis of the relative importance of 39 criteria for school closing as revealed in a survey of 500 Minnesota educators; highlights of a panel discussion on the politics of closing school buildings, focused particularly on relations with the community; brief synopses of particular facilities planning activities undertaken in 5 districts; a review of the literature on use of surplus school space; and a selected bibliography. (PGD)

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SCHOOL BUILDING UTILIZATION:

Crisis or Opportunity?

EA 013 564

Educational Cooperative Service Unit
of the Metropolitan Twin Cities Area
360 Colborne Street
St. Paul, Minnesota 55102

July 1979

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FOREWORD

Reacting to the growing interest in the school closings and building utilization question, the Special Projects subcommittee of the Planning and Research Commission authorized the staff of ECSU to research the question. The staff reviewed the current literature and proposed two studies, 1) a study of facilities utilization in Metro ECSU districts, and 2) an opinionnaire on school closing criteria.

In addition, a workshop was organized to provide for a review and discussion of the literature and presentation of a statistical profile of the region. Working with the Inter-Agency Liaison committee, the staff organized panel presentations by administrators who had some experience in dealing with school closings and/or the selection and implementation of alternative uses of school buildings.

The present document summarizes the research materials, the statistical data and the panel presentations of the workshop. It seemed fitting to preface this summary of the workshop proceedings with a transcript of Governor Al H. Quie's opening remarks, which addressed both the concept and the spirit of the workshop: "Fluctuating Enrollments: The Future Challenge."

Gerald G. Mansergh, ECSU
Executive Director

John E. Laramy, ECSU
Coordinator of Planning
and Research

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I

KEYNOTE ADDRESS

FLUCTUATING ENROLLMENTS: THE FUTURE CHALLENGE

GOVERNOR AL H. QUIE

KEYNOTE ADDRESS

FLUCTUATING ENROLLMENTS: THE FUTURE CHALLENGE

It's good to look out over the audience and see some familiar faces. I also see some new faces whom I look forward to meeting. I noticed, Randy, that in your introduction you referred to your organization as E-C-S-U. I know that many people call your organization Eck-Zoo, so before I get started I want to make a pact with you - I won't call your organization S-Zoo or S-Q if you don't call me Q-E.

I think it's great that such a diverse group of people is concerned with education planning. Too often human beings associate only with those who think like themselves, missing the cross fertilization of ideas which occurs when people with different backgrounds share ideas. In the audience today we have school administrators, parents, school board members and representatives of government. Your varied backgrounds will help bring about a rich communication that otherwise might not occur as we seek solutions for the future's challenge - fluctuating enrollments.

Today's conference addresses the question of facilities utilization - how we, the state's education planners, can plan for the best use of our education facilities. At this conference the political considerations of school closings will be discussed as well as alternative uses of these buildings.

As you consider possible options, I caution you to keep in mind that the purpose of our school facilities is educating the child. The educational interests of the child must be our first priority as we make decisions about our educational facilities.

Also, we must involve the parents in our decision-making process. Parents want to keep schools in their neighborhoods and this desire is expressed most strongly whenever the possibility of a school closing arises. I have noticed that the best way to increase interest is to prohibit people from doing something. In fact, I have often said that the best way to increase church attendance would be to lock the church doors and deny people entrance. In planning for the future, then, we must seek to involve parents. In addition, we must keep in mind the difficulty of accurately

projecting enrollment trends.

As we look ahead to the future attempting to predict what our school building needs will be, we see some uncertainty. While it is fairly easy to predict enrollments for the next four or five years, ten year predictions are somewhat more difficult, since tomorrow's kindergartners are just now being born. We've all heard much about declining enrollment but this isn't the entire story.

Enrollment in Minnesota's elementary and secondary schools peaked in the 1971-72 school year and has been dropping ever since. However, in the mid '80's, the constant decline in school age population is expected to level off, and thereafter will increase slightly and fluctuate.

Then, beginning in 1980, enrollment in our elementary schools is expected to increase as the offspring of the baby boom generation reaches school age. Just how large this "echo-effect" will be isn't known, however, since many of these children haven't yet been born. We do know, though, that school enrollments will reach a low in 1985 and after that fluctuate throughout the century.

I'd like to address the question of how we, the state's educational planners, can assist our schools to meet this challenge of fluctuating enrollments. I will discuss: the need for flexibility; the need for plans which consider social as well as financial costs; the need for positive and innovative thinking about the future's challenge and finally, the need for community input into the planning process.

First, flexibility must become the trademark of our educational planning. We can't be certain of our predictions for school enrollments beyond the next five years, and we can't anticipate precisely what future settling patterns will be like.

For example, the Bloomington and Eden Prairie school districts stand side by side, yet enrollment projections for the two districts vary greatly. While the Bloomington district is expected to experience a 40% decline in enrollment during the next 5 years, Eden Prairie anticipates a 26% increase. As we plan for the future, we therefore must seek flexibility in our use of space, our funding and our thinking.

In the next decades, the kind of classroom space which is available will vary

between school districts and over time. For example, a school in a district with high housing costs might face declining enrollments at the same time a school in a middle class district experiences rapid growth. Or, a senior high school which currently has an abundance of students might face a severe decline in enrollment two years from now as today's junior high students enter high school.

We as educational planners must accept the challenge posed by constant shifts in enrollments. We must recognize that one massive adjustment in our facilities utilization now may soon be outdated. And therefore we must seek decisions which allow fine tuning over a long period of time.

As we make decisions about facilities utilization, we must try to retain as much financial flexibility as possible. This is a real challenge, I know, because of our current system of school finance.

As you know, the property taxes become less and less important in recent years as sales and income taxes have increased. And with this shift from a locally collected tax to a tax collected by state and federal government, local financial flexibility has diminished. State and federal government simply has not been able to resist attaching strings to the money it distributes back to localities. Thus, block grants have given way to categorical aids. And with each categorical aid, some local financial flexibility has been lost.

Recently, the State Deparment of Education estimated that the average school district controls less than 5% of its general fund budget. Certainly, this makes financial flexibility difficult to maintain. But I want you to know I empathize with these constraints. It's been said that the governor controls only slightly more than 8% of all state costs.

And so, in planning for the future, we both must seek to assert firm leadership over the controllable portions of our budget and at the same time, seek decisions which will allow for long-term financial flexibility.

In striving for flexibility in the use of buildings and in the expenditure of funds, we must also maintain flexibility in our thinking. The challenges which confront us are constantly changing. Just because a solution worked in the past is no guarantee it will succeed in the future. We, therefore, must seek new solutions to today's problems. In the long run, flexible thinking may be the most difficult form of flexibility to maintain; yet, I firmly believe that a flexible frame of mind may prove the key ingredient for successful management of our schools.

As we strive for flexible decisions, we must also strive for decision-making which also considers opportunity costs. What do I mean by opportunity costs? Economists define this term as "true" cost of making one decision over another. By "true" cost, I mean long-term social and emotional costs as well as financial costs. I also mean the inferred cost of not doing something else.

E.F. Schumacher discusses the importance of considering all costs in his book, Small is Beautiful: Economics as Though People Mattered. If you haven't read this book, I recommend that you do so - especially the chapter on education. According to Schumacher, the objective of our educational system must be to help students clarify their central convictions. Specifically, to help students understand the world in which they live and help them make choices.

Education which fails to do this is mere training or indulgence, says Schumacher. And I agree.

In making decisions about the use of buildings, we must keep this central objective of education in mind. If we don't, our decisions will breed conflict.

Recently, I visited the Olney School in Philadelphia - a school whose enrollment has risen from 4600 to 5600 due to consolidation. The building was so cramped that there wasn't enough space for children to eat - even with plastic forks and knives - it was simply too dangerous. As a result, the cafeteria was closed and the school was started earlier in the morning - all because of citizen concern.

The importance of considering opportunity costs is also evident in the area of non-traditional education. As we all know, individualized instruction costs

more dollars than traditional teaching methods. But, because non-traditional education costs more financially doesn't mean non-traditional education is the most expensive choice.

Studies have shown that the crime rate goes up as unemployment increases. And while our educational system isn't directly responsible for our unemployment rate, good educational systems can greatly enhance the employability of individual students.

A good educational system can therefore help alleviate unemployment and indirectly reduce crime and welfare costs.

Therefore, as we make decisions about facilities utilization, we must constantly consider the impact of our decisions on the education of a child - whether our decisions will assist teachers in individual needs of each child.

Traditionally, our schools have limited their attention to children in grades K-12. But perhaps our schools should also examine what happens to children once they graduate or drop out. Perhaps our schools should be thinking of the long-term societal costs of education to the community as a whole. Only by considering societal as well as other opportunity costs can we hope to make the best plans for our state's educational future.

As we prepare to meet the future's challenge of fluctuating enrollments, we must keep in mind a third need - the need for positive thinking. We must look to the future as an opportunity to improve our educational system. The importance of maintaining a positive attitude about the choices we face is discussed by Peter Drucker in his well-known book, Management. In this book, Drucker draws a distinction between problem-focused and opportunity-focused organization. According to Drucker, a problem-focused organization is one which takes the defensive - that is, an organization uses present choices as an opportunity to achieve the goals and objectives of that organizaiton.

To paraphrase Drucker, the decisions we make must be judged by the question: What opportunities will have the greatest impact on the performance of our schools? The question we must ask ourselves then, is: How can we turn today's challenges into tomorrow's successes?

As I've said on several occasions, declining enrollment offers an opportunity to

improve the quality of our educational system. What do I mean? I mean that if state aid to education remains constant while enrollment drops, actual dollars available for educating each child will increase.

How can these additional dollars best be used? I believe they can best be used to reduce class size and individualize instruction in grades K-3. The years a child spends in the primary grades are critical to his or her development. This is the period in which a child develops his basic values and attitudes. It is also the age in which parents are most involved in their children's education.

Another way that we can turn today's challenges into tomorrow's successes is to use fluctuating enrollments as opportunities to reexamine what quality education actually means. We must remember that quality cannot be measured by the sophistication of our students to function within society. By this I do not mean that quality should be measured by the innate intelligence of students or the ability of students to perform on tests. I define a quality educational system as one which helps its children develop to their fullest potential. It is my personal hope that each child who graduates from a high school in our state will leave fully prepared to enter college or obtain a job.

Providing a quality education, not use of our school buildings is the greatest challenge facing our educational system today. In planning for the future, then, we must not become disturbed by the uncertainty posed by fluctuating enrollments. Rather we must use this uncertainty as an opportunity to improve the quality of our educational system.

Finally, in formulating plans for the use of our school buildings, we must take cognizance of the strength which results from local decision-making. I urge you to consider carefully the size of your community.

First, we must keep the people informed. There is a tendency for us to believe that we know best and that educating our citizens is simply too big a job. Now I know from personal experience that education is a long and tedious process. But it's also an essential process as I learned many years ago. My first act as a school board

member was to try to close a school. To me, consolidation made sense and I assumed that it would make sense to others as well. But I was wrong. When the annual meeting was held, everybody - and I mean everybody - in that school district turned out. And the entire school board voted down my idea of consolidation. Every single one of them. That was a dismal moment for me and I still remember how I felt. I remember thinking, "What's wrong with all these people that they don't understand?" And then I realized that I needed to help them understand. So the next year I talked and talked to all the people in that school district about the desirability of consolidating. And I convinced them. Nobody was opposed anymore. In fact, the people in the community so supported consolidation by the end of that year that when the meeting was held, no one showed up. They trusted us to make the right decision. By explaining our ideas, we gained citizen support. And that's why I believe it is so important that we make information available to the people.

A second aspect of local decision-making is that we ought to keep schools open and as close to the parents as possible. By keeping schools open, we gain greater support amongst the people. Let me tell you why. People care most about their own children and secondmost about the friends of their children. This is only natural and there is no reason to expect people to behave differently. I believe schools can use this human tendency to their advantage, however. By keeping schools in the neighborhoods we draw on the strength of citizen concern. We draw on the strength of citizen interest in our neighborhood and community. By keeping schools open we also enhance community pride. Smaller neighborhood schools are more apt to reflect the values of a community. They are more apt to be viewed by the community as a symbol for its beliefs. To the extent possible, we must seek to preserve this diversity by keeping our schools out in the neighborhoods. We must avoid closing neighborhood schools if alternative means for providing quality education can be found.

In conclusion, I'd like to say that I recognize that the challenge posed by fluctuating enrollment is great. At the same time, I believe strongly that today's crises can provide tomorrow's opportunity if we plan now for flexibility, by examining

the long-range implications of our decisions and by involving the people in the process.

As we plan for the future, I caution you to remember always that bricks and mortar are only a means for achieving an end. Our foremost objective must always be to help our young people develop to their fullest potential.

Randy Johnson read earlier a statement from my inaugural address which I'd like to repeat now. "We now know as never before that no nation, no state, no people can achieve greatness unless they believe in something - something that touches the spirit." I hope that in the next few years you and I can work together to build an educational system which gives our young people something to believe in. To do this we must devise ways to kindle the spirit of understanding within our youth. This is an exciting business. No other government endeavor compares to the thrill of educating our young people. All of the citizens in our state depend on you to make wise decisions. I look forward to working with you in the upcoming years to help us make our excellent educational system even better.

II

SCHOOL FACILITY UTILIZATION

STATUS OF REGION XI

SCHOOL FACILITY UTILIZATION
STATUS OF REGION XI

Introduction

The purpose of this section is to describe the use, location and condition of educational facilities as of the 1977-78 fiscal year. The data reported in this section was compiled from the forty-nine school district plans submitted to the Region XI Educational Planning Task Force as mandated in Chapter 447, House File 550, Article X of the 1977 Minnesota laws.

Use and Condition of Educational Facilities

The local plans of 49 districts revealed that 84 percent of the existing facilities are either used for, or are intended for, classroom use. The remaining buildings are considered office space, warehouse or other (undesignated) use, (refer to Table 1).

TABLE 1

SUMMARY OF USE OF EXISTING FACILITIES

Use	Number of Buildings	Percent of Total
Elementary	347	57
Middle	16	3
Junior High	81	13
Senior High	67	11
Administration Offices	19	3
Warehouse	4	1
Other	70	12
TOTAL	604	100

Table 2 (see following page), describes a specific summary of the grades housed in the buildings for which data were reported in the forty-nine local plans.

As reported, the majority of school buildings are housing grades kindergarten through six or some combination of those seven grades. The next largest proportion of school buildings house a combination of grades seven, eight and/or nine. Thirteen percent or seventy six school buildings were reported in the grades seven through twelve category. The leased

TABLE 2

SUMMARY OF GRADES HOUSED*

	Number of Buildings	Percent of All Buildings
Preschool only	1	
K-3	19	3 (includes K,K-1,K-2,K-3, 1-3,2-3)
K-6	304	50 (includes K-4,K-5,K-6,1-5, 1-6,2-6,3-6)
4-6	9	2 (includes 4-5,4-6)
5-9	16	3 (includes 5-7,5-8,6-8,6-9)
7-9	75	12 (includes 7-8,8 only,7-9, 8-9)
7-12	76	13 (includes 7-12,8-12,9-12, 10-12,11-12)
K-12	9	2 (includes K-7,1-7,K-8,K-12)
Special Education only	10	2
No grades housed	50	8
Leased	7	1
Anticipated Closing	22	4
Closed	6	1
TOTAL	604	100

*for a more detailed breakdown of grades housed, see Appendix A

---

category refers to buildings that were reported to be leased to another district or agency by the forty-nine school districts in the region. Caution should be used in interpreting the number of building closings. Regarding buildings that were reported as closed, it seems very likely that many districts did not include any data on buildings closed for 1973-74 to 1977-78, the historical base for the local plans.

As reported in Table 3, most of the region's buildings were erected between 1941-1968 (58%). The years between 1960 and 1968 saw the fastest development, with approximately one-third of the existing facilities being built in those years. This period also saw the greatest growth in terms of additions to existing facilities, with 33 percent of all additions made in those years. (Refer to Table 4.)

TABLE 3

SUMMARY OF DATES BUILT

	No. of Buildings	Percent of Total
1884-1940	163	27
1941-1959	161	27
1960-1968	189	31
1969-1978	91	15
TOTAL	604	100

TABLE 4

SUMMARY OF ADDITIONS TO EXISTING FACILITIES

Date of Addition	Number of Additions	Percent of All Additions	Percent of All Buildings
1889-1940	26	8	4
1941-1959	59	18	10
1960-1968	112	33	19
1969-1973	79	23	13
1974-1978	61	18	10
Total Buildings With Additions	337	100	56
Buildings With No Additions	267		44
Total Buildings In District	604		100

For a detailed frequency distribution on the condition of facilities by date, see Appendix B.

The crosstabulation of the local estimate of school facility condition and the year built contained in Appendix B shows that 85.8 percent of the buildings reported in the local plans are in good to exellent condition. All the buildings that were rated poor were built prior to 1940. The other category includes the ratings of seven buildings which were not classified in the excellent to poor range. Not specified refers to special programs which are housed in more than one site and not rated. Appendix C reports the condition of the buildings by the use of the building.

In addition, Table 5 reports that over three-fourths of the region's buildings are of masonry construction.

Table 5

SUMMARY OF TYPES OF CONSTRUCTION

Type of Construction	Number of Buildings	Percent of Total
Masonry	461	76
Frame	5	1
Masonry and Frame	76	13
Other	62	10
TOTAL	604	100

It could be anticipated, therefore, that capital improvements in excess of $200,000 per building are not planned for 88.7 percent of the facilities. Though the present condition of a building is not the only factor involved in planning capital improvements, satisfactory building condition and declining enrollment may indicate there is no need for major capital improvements.

For the 1977-78 school year, the average capacity for all buildings in the region was 85.77 percent. By county, this percentage ranged from 77.91 percent in Carver County to 93.71 percent in Scott County. (Refer to Table 6.)

TABLE 6

DESCRIPTION OF SUBPOPULATIONS

County	Average Percent Capacity*	Number of Buildings
Anoka	86.87	69
Carver	77.91	11
Dakota	86.36	59
Hennepin	83.46	221
Ramsey	88.07	121
Scott	93.71	14
Washington	88.23	40
Region XI	85.77	535

*Because some children are not assigned to a single building, total enrollment is not accounted for in certain districts. The number of buildings involved does not significantly change the picture for the counties or the region.

Disposition of Closed Buildings

As school districts face the reality of an increasing surplus of space as enrollment declines, local officials are left to negotiate the delicate balance between public support for neighborhood schools and the financial pressures of maintaining under-utilized or in some cases, empty buildings. However, once there is community suport for school building closings, the method of disposing of the building must be determined. Table 7 reports the disposition of a sample of closed buildings in seventeen Region XI school districts reporting school building closings from 1973-74 to 1977-78.

TABLE 7

DISPOSITION OF SCHOOL BUILDINGS
FOR 17 REGION XI SCHOOL DISTRICTS
FROM 1973-74 TO 1977-78

		Number	Percent of Total Closed
Sold:	Non-profit Agency	17	26
Sold:	For Profit Agency	7	11
Leased:	Non-profit Agency	10	15
Leased:	For Profit Agency	0	0
	Mothballed	2	3
	Converted for Other Use	16	24
	Other	14	21
	TOTAL CLOSED	66	100

Of the sixty-six buildings reported to be closed, 41 percent were sold or leased to non-profit agencies. This includes the conversion of school buildings into senior citizen centers, legal aid centers, city recreation centers, etc. Twenty-four percent of the buildings were converted for other uses in the community, such as: cooperative school programs, libraries, adult education centers, special education centers, learning centers, etc.

The buildings that were sold to for-profit agencies were converted into offices, apartments and art galleries, to mention a few uses. Mothballing of a building refers to closing but keeping a building and not using it for programs and services. The other category refers to buildings that were razed, up for sale, or are pending a decision by the school board. Refer to Appendix D for a detailed listing of alternative uses of school facilities.

III

CRITERIA FOR SCHOOL CLOSINGS

CRITERIA FOR SCHOOL CLOSINGS

Introduction

In October 1978 a survey was sent to a sample group of 500 school superintendents, principals, teachers, school board members, and other school administrators to measure the importance of a number of criteria that could be used to identify buildings with a high potential for being closed. The criteria were generated through a review of the literature and were chosen because of their use by districts in closing buildings.

Thirty-nine criteria were presented for evaluation on the following scale: Not Important, Somewhat Important, Important, Very Important. Each response was assigned a value as follows:

Not Important	1
Somewhat Important	2
Important	3
Very Important	4

By using these weighted values and the frequency of the responses, a median response was calculated for each item on the survey. For purposes of analysis, the criteria were grouped into 6 main categories:

1) Financial Considerations
2) Physical Conditions
3) Adequacy in Filling Program Needs
4) Opportunities for Alternate Use
5) Geographic and Demographic Considerations
6) Other Considerations (including subjective and emotional issues)

The thirty-nine criteria are listed in Table 8.

Analysis of Importance as Perceived by Educators and School Board Members

Table 8 presents all the criteria grouped under the 6 main categories and breaks down the median responses by type of respondent. This table also shows the ranking of criteria based on median response by the entire group. The five highest ranking criteria are repeated in Table 9. (See table 8 and 9 on following pages.)

Table 9 shows that "District Long Range Plans" and "Anticipated Attendance Area Growth" tied for the top ranking criterion. This is not surprising when one considers that "District Long Range Plans" is a very broad criterion that theoretically describes many of the other more specific considerations included as criteria. That is, when a district makes long range plans, it takes into account the physical conditions of its facilities, the financial projections for the district, geographic and demographic factors, in addition to other conditions. "Anticipated Attendance Area Growth" or decline, as the case may be, is the very reason that educators, board members and other concerned citizens are looking at various criteria for school closings. If the anticipated attendance area growth looks promising, that is, if enrollments are increasing, most other considerations for school closings are likely to decline in importance.

The responses showed that the majority of respondents gave high priority to the factors making up a facility's physical condition. Table 10 shows the overall median response for each criteria category. A facility's physical condition was the most important category to each sample group. (See Table 10 on following pages.)

Alternate Uses of Educational Facilities

"Opportunities for Alternate Uses" was considered to be the least important category of criteria for school closings. This would tend to suggest that alternate uses become considerations only after the necessity for closing a particular facility has been established on the basis of other

criteria. (See Appendix D for suggested alternative uses of facilities.)

Congruence in the Perceived Importance of Six General Factors Affecting School Closings

The results of the analysis of the weighted data reported in Tables 8, 9 and 10 showed that the perceptions of superintendents, other administrators and school board members are most similar regarding the six school building closing factors. By rank ordering the median responses in Table 10, it can be seen that the factors are ranked in the same order by superintendents, other administrators and school board members. Principals' perceptions coincide closely with the perception of each of these three groups. The only difference for principals is in the ranking of the "Opportunities for Alternate Uses" and the "Other Considerations" criteria.

On the other hand, teachers' rankings differ from the other groups on three of the six categories with the greatest deviation on the "Other Considerations" criterion. It appears from the data summarized in Table 8 that the importance teachers assign to staff displacement and disruption and displacement of students criteria account for the deviation.

Table 8

CRITERIA FOR CLOSING SCHOOLS
MEDIAN RESPONSES

CRITERIA GROUP	SAMPLE GROUP						
	Superintendent n=39	Principal n=146	Other Administrator n=39	Teacher n=46	Board Member n=42	Total Group n=326*	Ranking by Entire Group**
Financial Considerations:							
Maintenance Cost per Classroom	3.25	2.94	3.25	2.73	2.96	2.97	13-14
Operation Cost per Classroom	3.22	3.05	3.32	2.55	3.03	3.02	12
Supportive Cost per Pupil	2.80	2.88	2.87	2.83	2.94	2.87	19
Energy Efficient Rating per Pupil Costs	2.81	2.77	3.07	2.64	2.80	2.81	22
"Mothballing" Costs	2.61	2.54	2.18	2.33	2.50	2.45	33-34
Category Median	2.81	2.88	3.07	2.64	2.94	2.87	
Physical Conditions:							
Building Condition	3.72	3.59	3.78	3.23	3.44	3.57	3
Life Safety of Building	3.57	3.34	3.37	3.23	3.35	3.36	4
Conformance to Building Codes	3.47	3.42	3.53	3.02	3.25	3.34	5
Site Size and Condition	3.41	3.27	3.33	3.02	3.13	3.24	7
Category Median	3.52	3.38	3.45	3.13	3.30	3.35	
Adequacy in Filling Program Needs:							
Amount of Surplus Space	3.38	2.96	3.27	2.69	3.19	3.03	11
Building Capacity	3.13	3.14	3.23	2.94	3.03	3.09	9-10
Adequacy of Special Facilities; Gym, Cafeteria, Auditorium	3.37	3.45	3.34	3.09	2.98	3.28	6
Outdated Equipment	2.59	2.76	2.78	2.94	2.56	2.75	24
Expansion/Limitation of Current Programs	3.03	3.19	3.13	2.87	3.19	3.11	8

*14 participants in the survey did not identify their status.
**Two figures represents a tie for the position in rank.

Table 8
(cont.)

CRITERIA GROUP	SAMPLE GROUP						
Adequacy of Filling Program Needs (cont):	Superintendent n=39	Principal n=146	Other Administrator n=39	Teacher n=46	Board Member n=42	Total Group n=326*	Ranking by Entire Group**
Expansion/Limitation of Educational Resources	2.92	3.01	2.91	2.89	3.08	2.97	13-14
Adaptability to Remodeling/Expansion	2.73	2.87	2.60	2.68	2.72	2.77	23
Adaptability to Contemplated Programs	3.17	3.20	3.21	2.81	2.93	3.09	9-10
Barrier Free Access for Handicapped	2.91	2.99	2.90	2.93	2.69	2.93	17
Category Median	3.03	3.01	3.13	2.93	2.98	3.03	
Opportunities for Alternate Uses:							
Zoning for Alternate Use	2.58	2.29	2.44	2.03	2.13	2.28	36
Non-educational Function in Community	2.60	2.40	2.53	2.38	2.50	2.45	33-34
Availability of Alternative Use in Community	2.76	2.65	2.69	2.57	2.50	2.65	27
Community Use of School	2.55	2.57	2.53	2.71	2.26	2.54	31
Community Education Programs	2.59	2.60	2.67	2.59	2.40	2.58	28-29
Market Value for Sale or Lease	2.90	2.63	2.54	2.12	2.57	2.57	30
Category Median	2.59	2.59	2.54	2.49	2.45	2.56	
Geographic and Demographic Consideration:							
Use of City Bus	1.21	1.30	1.18	1.84	1.43	1.33	39
Transportation Time and Distance	2.92	2.88	2.75	3.13	2.76	2.89	18
Transportation Costs	3.00	2.81	2.85	2.79	2.82	2.84	20
Minimum of Relocation	2.74	2.67	2.69	2.83	2.60	2.69	26

*14 participants in the survey did not identify their status.
**Two figures represents a tie for the position in rank.

Table 8
(cont.)

CRITERIA GROUP	SAMPLE GROUP						
Geographic and Demographic Consid. (cont.)	Superintendent n=39	Principal n=146	Other Administrator n=39	Teacher n=46	Board Member n=42	Total Group n=326*	Ranking by Entire Group**
Adjacent Receiving School	2.92	2.79	2.79	2.68	2.95	2.83	21
Socio-economic Profile	1.85	2.51	1.94	2.33	1.92	2.22	38
Integration Requirements	2.57	2.75	2.40	2.44	2.17	2.58	28-29
Geographic Location	3.08	3.00	3.00	2.77	2.88	2.96	15-16
Anticipated Attendance Area Growth	3.83	3.79	3.36	3.36	3.55	3.68	1- 2
Category Median	2.92	2.79	2.75	2.77	2.76	2.83	
Other Considerations (including subjective or emotional issues):							
District Long Range Plans	3.57	3.80	3.65	3.20	3.63	3.68	1- 2
Staff Displacement and Disruption	2.14	2.32	2.09	3.05	1.96	2.26	37
Relocation and/or Retraining of Staff	2.18	2.37	2.12	2.90	1.95	2.30	35
Displacement of Students' School	3.03	3.01	2.75	3.29	2.34	2.96	15-16
Community Support of School	2.53	2.90	2.26	2.89	2.50	2.73	25
Quality of Life Factor in Community	2.42	2.60	2.34	2.45	2.29	2.46	32
Category Median	2.48	2.75	2.30	2.98	2.32	2.60	

*14 participants in the survey did not identify their status.
**Two figures represents a tie for the position in rank.

Table 9

TOP RANKING SPECIFIC CRITERIA FOR CLOSING SCHOOLS

MEDIAN RESPONSES

CRITERIA	SAMPLE GROUP					
	Superintendent n=39	Principal n=146	Other Administrator n=39	Teacher n=46	Board Member n=42	Total Group n=326*
District Long Range Plans	3.57	3.80	3.65	3.20	3.63	3.68
Anticipated Attendance Area Growth	3.83	3.79	3.36	3.36	3.55	3.68
Building Condition	3.72	3.59	3.78	3.23	3.44	3.57
Life Safety of Building	3.57	3.34	3.37	3.23	3.35	3.36
Conformance to Building Codes	3.47	3.42	3.53	3.02	3.25	3.34

*35 participants in the survey did not identify their status.

Table 10

TOP RANKING CRITERIA CATEGORIES FOR CLOSING SCHOOLS
MEDIAN RESPONSES AND RANKING BY GROUP

CRITERIA GROUP	SAMPLE GROUP											
	Superintendent n=39		Principal n=146		Other Administrator n=39		Teacher n=46		Board Member n=42		Total Group n=326*	
	Resp.	Rank	Resp.	Rank	Resp.	Rank	Resp.	Rank	Resp.	Rank	Resp.	Rank
Physical Conditions	3.52	1	3.38	1	3.45	1	3.13	1	3.30	1	3.35	1
Adequacy in Filling Program Needs	3.03	2	3.01	2	3.13	2	2.93	3	2.98	2	3.03	2
Financial Considerations	2.81	3	2.88	3	3.07	3	2.64	5	2.94	3	2.87	3
Geographic and Demographic Consideration	2.92	4	2.79	4	2.75	4	2.77	4	2.76	4	2.83	4
Other Considerations (including subjective or emotional issues)	2.48	6	2.75	5	2.30	6	2.98	2	2.32	6	2.60	5
Opportunities for Alternative Uses	2.59	5	2.59	6	2.54	5	2.49	6	2.45	5	2.56	6

*14 participants in the survey did not identify their status.

IV

HIGHLIGHTS OF PANEL DISCUSSION:

"THE POLITICS OF CLOSING SCHOOL BUILDINGS"

HIGHLIGHTS OF PANEL DISCUSSION:

"THE POLITICS OF CLOSING SCHOOL BUILDINGS"

1. Ken Berg - Deputy Superintendent, St. Paul Public Schools

- The closing of St. Paul Schools due to life safety standards was not very difficult. The closing of schools for any other reason seems to be more difficult.

- There is probably too much emphasis placed on the building. If educational opportunities are similar in another school, there are generally few complaints. Program is the most important consideration.

- The process of school closing in St. Paul:

  The stage was set for reactions from the community. The administration felt it had an obligation to make recommendations, though it was not expected that recommendations had to be accepted. By presenting such recommendations, the administration avoided pressure groups teaming up against each other.

  A plan was presented to the community group before it was presented to the School Board. The plan supported the community group and allowed the Board to react to the community group.

  St. Paul held 13 public hearings. Out of these came recommendations for the closing of schools. From these recommendations, the Board will select the schools to be closed.

  The response was encouraging. People who never were involved came to meetings. We seemed to have a large group of satisfied persons, which was quite different from the past when there were several small interest groups.

  By this process, the school closing question was able to create a new interest group equally supportive of public education.

2. Ralph Leiber - Superintendent, Edina Public Schools

- The actors in the school closing drama have different concerns:

  High school students care about extra-curricular programs.
  Elementary school children care about their friends in class.
  Parents involved in PTA are concerned about programs, and about their neighbors: Are they doing the appropriate thing?
  Parents not in PTA are concerned about land value and use.
  Teachers are concerned about teaching their specialties, about being mainstreamed into another school.
  Administrators are concerned about an orderly transition - the staff, including maintenance, cooks, aides, all.
  Board Members are concerned about other members of the community.
  Coaches. . . .?
  Especially in the elementary school, there is the worry about the "out feeling."
  The Press - be sure to keep the Press informed, always in written form, always supply as much data as possible.

- The process of school closing in Edina:

  A task force considered the question long before all the actors were a part of it. They first identified the problem, then studied it well.

  The community must agree on the data; they must trust data since it is the basis for judgments.

  There must be ample time for the identification, the study and community involvement in the process.

  Work with the community group must be constant; they should have any and all data. If the data is sound, it should carry the decision.

  Remember, focus on the issue, not on a person.

  The political process is a series of compromises, no one idea is always acceptable. Be open to objections.

  Be big enough to accept better judgments.

3. Robert Johnston - Superintendent, Golden Valley Public Schools

- The concept of the neighborhood school may need to be changed. In a typical neighborhood, people may not know five or six families on either side. Yet when the question of school closings arises, the neighborhood becomes cohesive.
- Where it is possible in the policy statement of the community, invite other governmental levels to be involved, e.g., city council. In Golden Valley, the City Council's high level of interest led to the leasing of the middle school.
- The decision should be made on the basis of what provides permanent and complete education for the child. It is not possible to get 100% agreement. The right decision should not antagonize more than 49% of the constituents.

4. George Holthus - School Board Member, Hopkins

- The ultimate decision for school closing lies with the School Board. In Hopkins, we worked to develop finite criteria and to arrive at answers we could live with. We then modified the criteria. In the end we used the obtain-the-recommendations-of-the-administration-and-then-do-what's-right approach. Later we worked with groups to improve our decision, e.g., one group suggested moving the students as a block from the closed school.
- The Board took a tentative position and then held public hearings. This involves the community, elicits action on the community level and educates the general public.

QUESTIONS AND ANSWERS

1. Q: How do you go about getting everyone to accept your data base?

   A: 1. Get the best people in the data collecting and processing field. Ask those who challenge your data to identify why their data is better.

      2. Data will always be challenged. Be consistent and you will be believed. Point out the estimate factors in data, that there is a range of data that is acceptable.

2. Q: Is there a group that can give independent objective data?

   A: The State Demographer. A private group, Northstar Research. When we used their data, we updated it.

3. Q: What was the structure of the subcommittee of citizens? How was such a committee formed? Who validates the authority of the committee? (addressed to Ken Berg)

   A: From 157 community groups we determined who had a right to be on the committee. The Board made additional recommendations and invited all who had interest to join. In addition, at the public hearing, others showed up.

CASE STUDIES

1. To Sell or Not to Sell, Fred Atkinson, Superintendent, Bloomington Public Schools

   There are several factors relating to the selling of empty school buildings. Bloomington has sold three buildings in recent years, two to non-profit agencies and one to the Marquette Bank.

   Saleability is one factor considered among the criteria for closing school buildings. Zoning and geographic considerations relate directly to the saleability of the buildings.

   Some school districts choose to lease buildings anticipating enrollment increases. Bloomington and some other districts, however, have chosen to sell at least some of their buildings on the premise that the buildings will be obsolete before enrollment would ever require their reopening.

2. Developing Community Resource Centers, Sanford Witter, Superintendent, Mounds View Public Schools

   Mounds View Public Schools have successfully developed a community resource center in a building that could no longer be used as a school. The district has encouraged building use by a wide range of agencies and organizations, including:

   - E.S.L. (English as a Second Language) classes
   - adult education classes
   - services for senior citizens including:
     - drop-in center
     - orchestra
     - in-home center
     - transportation
     - meeting area
   - early childhood services
   - C.Q.E.
   - career clinic with a M.O.I.S. terminal
   - Ramsey County Mental Health offices
   - A.A. offices

   In addition, the district uses part of the building for its summer school office.

   The district has developed funding from a variety of sources, which, along with rentals, keep the building open. These sources include, Title V, E.S.E.A. replication, Homebound, 309 Project, C.E.T.A., Competency Based funding.

3. More Than One Way: The Minneapolis Experience, Ray Arveson, Superintendent, Minneapolis Public Schools

Minneapolis has explored several options for buildings that must be closed as schools. Buildings that are unsafe or too costly to rehabilitate may be razed rather than saved. The razed site will be sold. If a building is not going to be razed, the options are to hold for future use, to use one portion and rent out the rest, or to sell.

The process for selling a site involves city planning and the city council. The Minneapolis School Board has developed formal criteria for evaluating prospective sales/buyers in terms of the public good. The criteria for sale include,

- -that the entire site be taken into consideration
- -that the intended development will be supportive of the school program
- -that the proposed sale will return the property to the city tax roles
- -that the development would receive community support

A sample form for site evaluation can be obtained from - Minneapolis School District, 807 N.E. Broadway, Minneapolis 55413, call 612-348-6084.

4. Close Schools - Open Doors, Mike Hickey, Superintendent, St. Louis Park Public Schools

The closing of seven buildings in St. Louis Park has resulted in an opportunity to explore a variety of uses and partnerships. It is the philosophy of the St. Louis Park Schools that public land should be retained for public use. The sale of buildings to profit agencies, therefore, has not been made to date.

The district has converted three buildings to community centers, using space for the district's community education program and leasing additional space to non-profit community agencies - the United Way, the Red Cross, e.g. These centers operate at a profit or at least at no additional cost to the district. In summary, holding onto buildings helps to provide low cost services to the community and helps to maintain flexibility within the district for changes in enrollment and class size.

5. Concerns of a Growing District, Lew Finch, Superintendent, Anoka-Hennepin Public Schools

Although Anoka-Hennepin is the second largest school district in the region, it is not a growing district. It is more accurate to say that part of the district is growing (North) and part of it is declining (South). At the present time, there is an advantage to a district that has large administrative units. Anoka-Hennepin has 34 buildings the smallest housing 550 students, and the largest housing 900. The situation provides sufficient housing as the district declines in one area and grows in another.

Our needs are for program expansion, special education and special services. In five years we will know if we have need for additional facilities or if we have too many facilities. Right now we are taking advantage of year by year planning.

QUESTIONS AND ANSWERS

Q: What is your longest bus ride?

A: One hour, one way.

Q: What have been the social implications of displacement?

A: In elementary and junior high school, they don't care. In high school, they do.

Q: What about parents concern?

A: The people who are in Anoka-Hennepin close to Brooklyn Center would like to go to Brooklyn Center High School, which is closer to them than Anoka-Hennepin in their own district.

THE USE OF SURPLUS SCHOOL SPACE

A Review of the Literature

The Problem

In the United States, the 1950's and 1960's were years of population growth, when the total elementary and secondary school population grew from 28 million in 1950 to 42.7 million in 1960, a ten percent growth.[1] In the nation, the birth rate hit the all-time high in 1960 with 4.35 million births.[2] Surprisingly, this maximum birth rate was achieved when the number of women in prime childbearing years (20-29) was relatively low. The women producing the population boom were the babies born in the pre-World War II population slump.

Minnesota's highest birth rate occurred in 1959 when 88,000 babies were born.[3] From that figure the birth rate in Minnesota began to decline and by 1973 had fallen to 53,000 per year. In 1971-72, when 913,698 students were enrolled, Minnesota's total elementary and secondary public school enrollment reached its peak. Since then enrollment has steadily declined. In the 1976-77 school year, 869,613 students were enrolled, 44,085 fewer than just five years before.[4]

In that same year, 1976-77, Minnesota's largest senior class graduated,[5] but the decline already evident in the elementary grades

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[1]Educational Facilities Laboratories, Fewer Pupils/Surplus Space, (New York: Educational Facilities Labs, Inc., 1974.)

[2]Ibid.

[3]Minnesota State Planning Agency, The Condition of Education, (St. Paul: Minnesota State Planning Agency, 1977.)

[4]Ibid.

[5]Ibid.

and in junior high school will soon be evident at the senior high level. The women born during the baby boom of the 1950's and 1960's are now in the prime childbearing years, 20-29. Their offspring should soon show up as a bulge on the population charts.[6] When one considers that the baby boom of the recent past was accomplished by one of the smallest groups of women in recent history, the potential of the present group of women is staggering. However, several factors seem to be tempering the desire of this group of women to raise children or at least to raise more than one or two children per family.

To predict that this trend will continue or to analyze the causes for the low fertility rate may be precarious, but certain factors seem causal. The variety of effective birth control methods available to families and the changing role of women in society, are significant. The high material aspirations of young parents for their own and their children's standard of living, together with the high cost of raising children in an economy where children are a severe financial liability and of little economic advantage may be causing couples to postpone starting families or to forego the adventure entirely. In addition the percent of the population marrying is smaller and more people stay single longer than ten years ago.

In the 1800's, the fertility rate was about seven children per woman; in 1975 it was about 1.8, below the zero population growth figure of 2.1 children per family.[7] Demographers predict a continued

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[6]State Planning Agency, Op. Cit., p. 2.

[7]Educational Facilities Laboratory, Surplus School Space; Options and Opportunities, (New York; Educational Facilities Labs, Inc., 1976.)

stable population with no growth after the brief bulge in the early 1980's.[8]

This population information is significant because it provides a base upon which to judge enrollments for the future. The United States achieved its maximum school population in 1971 when the enrollment was 51.4 million children.[9] This was also the peak year for Minnesota school enrollment. Enrollment had been steadily increasing in the 1950's and 1960's. The schools that had struggled to meet the ever increasing numbers of students had barely begun to utilize their new facilities when it became obvious that they had overbuilt. The country was geared to a growth economy, a growth psychology; adjusting to a new approach toward educational planning proved to be one of the most difficult challenges facing the American public school.

Predictably, the space was first available at the elementary school level. Now there is surplus junior high space, and will soon be surplus senior high space. The nature of this space is a significant factor in planning for its use, since the processes used for decision-making regarding surplus elementary space may not be useful in approaching the problem of declining senior high enrollment. Size, structure, location, facilities, and previous use of surplus space bear a direct relationship to the future use of that space. The markets for selling, renting or leasing elementary school space may not lead to any tenants for senior high space.

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[8]State Planning Agency, Op. Cit.

[9]Educational Facilities Laboratory, Surplus School Space.

Since elementary buildings tend to be smaller than senior high buildings, it may be easier to phase out one and bus students to another. When a district has only one senior high, but the capacity is more than needed for the students, a totally different solution is needed.

Dealing with the community during the period of adjustment to declining enrollment is not an easy task. Americans used to a growth economy have difficulty adjusting to a stable or declining one. Moreover, schools hold symbolic meaning to the people they serve. Quality programs and well designed buildings are a symbol of affluence and a high quality of life. For years, the community has been encouraged to "do the right thing" for its children and the future generations by voting taxes for quality programs and bond issues for fine structures. In some cases, communities may still be paying for the surplus structures and are proud of their investment.

Part of the community's identity, the identity of the children, and the community spirit is tied to the elementary school, where the nostalgia of childhood bliss blends with neighborhood identity to make the school a symbol of unity and friendliness. It becomes, in effect, the "social cement" of the community. The high school is even more a community symbol. J. B. Conant called the high school the "most American of all institutions; the people's college."[10]

Now these same taxpayers are being asked to decide on phasing out

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[10]Conant, James B., The American High School Today (New York: McGraw-Hill Book Company, 1959.)

their schools. Naturally, the situation is an emotional one, often arousing critical and fault-finding reactions. Strong as these reactions are, they are a legitimate expression of public opinion and essential to the success of the process.

The Role of Planning

Planning is useful anytime; it is vital in the period of declining enrollments. The first stage of planning must look at the needs of the future regarding enrollments, programs needed, facilities needed and the budget constraints which will likely exist. Most Minnesota school districts have had experience in this type of planning to meet the requirements of the school district mandatory planning section in the 1977 School Omnibus Bill.

Enrollment projections for the next five years can be predicted with relative accuracy using the cohort-survival method of projection, by using local district census figures and the present enrollments. The only unknown factors are in and out-migration figures of the district population. These factors can be determined by analyzing the open space available for building, the zoning and sewer regulations, and by using past information on the socio-economic level and size of the families moving in and out of the area. Predicting beyond the next five years is more difficult because it involves making predictions on the above factors as well as on numbers of children not yet born. Figures from the state demographer, the Metro Council and similar sources, however, can be helpful in long range predictions. It becomes more difficult to make accurate predictions as the number of unknown variables increases in district long range planning. These predictions are crucial to education in Minnesota, since under the present State funding

formula, the number of children in attendance determines the amount of money available to the district. The exact dollar amount has been increasing each year, but inflation has also made each of these dollars buy less.

The school staff and the community will need to make decisions about the cost and facility utilization of the programs they want and need. Goals and objectives for the educational program and for specific components of the program must be stated and translated into operational definitions. Again, the planning required by the PER legislation and the Educational Planning Task Force will prove relevant.

Next, districts need to look objectively at the facilities they own. Several excellent and comprehensive examples of school facility studies exist and are available on microfiche in the Educational Cooperative Service Unit Library.[11] Comprehensive studies of facilities usually contain maps of the district with facilities pinpointed as to level of instruction. Such studies most commonly

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[11] Goetz, Frank, and Others, Facilities Study Report to the Board of Education, Phase I, (Michigan; Sept. 1973. Birmingham Public School, 1973).

Goetz, Frank, and Others, Assessment of Physical Facilities, A Phase II Report of the Facilities Study Committee (Michigan: Birmingham Public Schools, 1974).

Kansas State Department of Public Instruction, School Facilities Section, School Facilities Survey for Unified School District No. 353, (Topeka: Kansas State Dept. of Public Instruction, 1966).

Reida, G. W., A Manual for Evaluating School Facilities (Topeka: Kansas State Dept. of Education, 1962).

South Carolina Commission of Higher Education, Building Quality Evaluation (Columbia: South Carolina Commission of Higher Education, 1976).

tabulate the type of construction, capacity, number of regular and special purpose classrooms, office space, libraries, gymnasiums, locker room areas, auditoriums, theatre facilities, pools, restrooms and other internal features as well as outside facilities such as parking spaces, baseball and football fields, golf courses, track fields, etc. Some examples also include details of lighting, air-conditioning, heating, wall and floor surfacing and the number and size of doors and windows. Whether or not the buildings have ground level access, ramps or stairs, and elevators, are all significant factors due to the recent legislation on making opportunities accessible to the handicapped.

At the very minimum, a possible tenant or buyer will need to know:

a. location of the building (name, address)

b. amount of space available (square footage and number and type of rooms)

c. term or length of contract (if tenant)

d. on-site parking spaces and privileges

e. accessibility to building (if tenant) during days, nights, weekends, etc.

f. specific facilities and/or availability and use of these (if tenant)

g. availability of janitorial service and food service

h. cost or rental rate

After the precise and accurate description of each facility is recorded and the cost of maintaining and operating each building is computed, it is important to look realistically at the future financial situation of the district and decide whether the district would benefit

more from selling the surplus property or from renting or leasing the space. If only partial buildings are available the second option is the only possible one, of course. If finances permit, expanded programs of the school can be considered and/or community agencies can be permitted to use the building at little or no cost.

A decision should be made as to whether or not the district will need the facility in the near future and if the facility is of the type that will fit or adapt to the educational needs of the future. The type and amount of energy used may be a prime consideration in deciding whether to hold on to or to dispose of a building. The district may wish to verify, or at least, to estimate the revenues to be gained by selling and those to be gained from leasing or renting.

After setting educational goals and objectives, and enumerating programs, enrollments, and the probable usage of facilities; and after accurately surveying and recording the status of the district facilities, it is time to begin making decisions on the use and/or disposal of the surplus space. The community, along with the professional staff and the school board, should have been involved in the previously mentioned procedures; it is vital that the community be directly involved in deciding the fate of the space available. The toughest decision generally revolves around what space is to be declared excess in what facility.

A citizens' committee may be one of the best methods of reviewing the situation facing the district and studying the alternatives. The make-up of the study committee may vary from district to district. Making an open invitation in a district newsletter to anyone who wishes to serve may be one way of allowing the most interested and

concerned individuals to be a part of the decision-making process. The district chairperson may wish to supplement this group by inviting representatives of various parent, civic, and community groups to round out the representation. A few individuals with professional expertise in educational planning might also be asked to meet with the group. Two committees may be necessary -- one to recommend what space to close to the school program and one, later, to study and recommend alternatives for disposal or use.

Care should be taken to have a representative committee, but too large a group could incapacitate itself. The thoughts and feelings of as many community groups as possible should be heard and considered. However, all of these do not need to be members of the on-going committee.

The first task of the committee should be to state clearly the problem before it and the task to be accomplished. A statement of the problem might read:

The School Task Force on Utilization of Surplus Space has been directed by the Board of Education of _____ Public Schools, District #_____ to:

(1) Review:

(a) the district goals and program needs

(b) the enrollment predictions

(c) the size and quality of available space

(d) the budget

(e) the administration's estimate of surplus space

(2) Recommend to the Board:

(a) whether or not excess space does exist

(b) whether or not such space should be used for expanded school programs

(c) what buildings or areas should be closed

(d) whether or not such space should be retained in district ownership, and if so, should it be:

- mothballed
- rented
- leased
- used for a cooperative venture with a community agency
- used for a cooperative venture with a neighboring district
- sold

(e) what programs can and should be permitted to use the surplus space

- list priorities
- advantages and disadvantages of each

The committee should also think seriously about the best procedures to employ in compiling the recommendations. Hearing various citizen groups and surveying the community and special interest groups, are all valid procedures. The Board should also hold public hearings after the final recommendations of the committee are presented and before the Board takes final action.

As a first step in the gathering of information, the committee may wish to survey the desires of the community regarding which buildings and areas should be closed and the use of surplus space. A questionnaire listing as many possible options as can be presented is recommended, but space should be left for the respondent to include options not listed. The committee may wish to preface the questionnaire with some factual information about program, enrollments and costs.

The responses, when tabulated, will serve as a sound basis upon which the committee can look at options. Knowing early in the planning stage what the taxpayers will or will not accept may avoid fruitless or unacceptable actions. It may also avoid having a committee recommendation which is rejected by the board and the citizenry at the time of public hearings and final actions.

It is also necessary to know the zoning and other legal restraints which pertain to any property to be declared surplus. Certain residential areas are zoned so that various use options are automatically out of consideration. It is important to know the highest possible use of the property because that determines the price that can be charged for sale or rental.

Representatives of agencies that know community needs or may be potential users of the surplus space (the municipality and its departments, community service agencies, churches, private schools, recreation leagues, music-choral groups, art enthusiasts, special hobby and craft clubs, to mention only a few) should be informed of the space and allowed to discuss any possible use they might have for the area. These groups could also be surveyed by questionnaire as to their interest in the space. Other possible interested groups might be nursery and pre-school programs, day care centers, adult education or community education programs, vocational and technical programs, and senior citizen groups.

If the property can be used for commercial or residential use, developers and real estate brokers can be contacted for ideas on possible uses.

Planning on a wider basis, with neighboring districts or at a regional level may offer other options. Schools with declining enrollments can solve mutual problems. Needs of the broader community, such as adult education, vocational-technical education, community college programs, special cooperative education for low-incidence handicaps can be solved by cooperative ventures of several districts.

After the available data has been gathered and reviewed, and after all the options have been explored, the committee should compile and report its conclusions and recommendations to the Board of Education. Such conclusions might look like this:

CONCLUSION:

As a result of the committee's extensive study and review, the following conclusions were reached:

1. There is considerable excess space available in the district

   (a) two elementary buildings should be closed before the beginning of the next school year

   (b) another elementary building should be closed for the following school year

   (c) twelve junior high rooms (or the equivalent of one wing of one of the buildings) should be closed before the next school year; another eight rooms are estimated to be available the following year. Projecting ahead three years, the committee feels one junior high should be closed.

(d) seven senior high classrooms should be closed before the beginning of the next school year; five more rooms should be available for closing the following year.

2. Although there are advantages in having a school's enrollment at the building capacity, none of our schools need to be closed for program reasons.

3. The major reason for closing schools and sections of buildings next year would be to save operating expenses and gain revenues from sale or net rent.

4. Unless the financial picture changes significantly in the months and years to come, the _____ school district will experience serious financial programs unless costs are cut by using less space.

RECOMMENDATIONS

In view of: our excess capacity
the possible need to save operating funds
the obligation to operate the school system economically and effectively
the desire of parents to keep neighborhood schools open

Two alternatives seem appropriate to consider:

A. Close two elementary schools by next year and rent or lease junior and senior high space, or

B. Vote additional millage to keep all schools open.

I. If the Board determines that closing one or more schools would be in the best interest of the district, the committee recommends:

A. As many as five schools may be considered for closing and they are:

Harriet Jones
Everly
Washington
Pioneer Village
Jefferson

B. Close two schools effective the end of the 1979-80 school year and close a third school effective the end of the 1980-81 school year.

C. If schools are closed and income is realized from the sale or rental of these facilities and property, the committee recommends that these monies be used for relieving our bonded indebtedness on other buildings.

II. In view of the declining enrollment in the junior and senior high buildings, the committee recommends that the space available be rented to civic or community agencies, and/or used for cooperative programs with another school district. Closing a junior high facility may be an option by 1981-82.

During the course of the study and review processes, the committee should have reviewed the advantages and disadvantages of most of the alternatives available to the district. To aid the Board in making a final decision, to present to citizens a rationale for the committee's recommendations, and to aid the committee in the process of making decisions, it may be wise to list the possible alternatives available and the advantages and disadvantages of each.

If the committee is dealing with the initial problem of recommending which building is to close, the list might look something like this:

1) leave all buildings in current use with reduced staff and enrollments

advantage: keep all parents and communities happy

disadvantage: too costly

2) close Everly Elementary

advantage: closing will save on operational costs; maintenance and operation costs are highest per square foot of any building in district.

disadvantage: parents unhappy; most students were walkers, now have to be bused.

3) close Pioneer Village Elementary
(etc. for each option)

When the committee considers possible use options for the surplus space, a similar list can be compiled again showing the use option and the advantages and disadvantages for each of the options. Some of these options may pertain to savings to the district or money gained by one use option over the other. However, the committee must remember the buildings are the property of the citizens of the community; sometimes a wise community use which does not show a profit for the school district is a more satisfactory solution than a use decided on a totally monitary judgment.

The Alternatives

The first consideration for use should, of course, be whether or not the school district wishes to and can afford to use the surplus school space to maintain, supplement, expand and enrich the existing program. Many districts have never had the luxury of enough space to offer resource centers for student expanded study; music, art, or special project areas; or career and guidance resource centers. Often

library and recreation space has not been adequate, and special education programs and vocational-technical offerings need expansion space. Where this is the case and where the finances of the district permit, the educational program can be expanded and the needs of the student population can more adequately be met by using the space made available by declining enrollment. Budget will be the prime concern in this decision since many schools with declining enrollments are also faced with severe cost limitations.

The second consideration, also related to the financial situation of the district, is the question of ownership. The factors to be considered in deciding whether to hold, sell, lease or rent are complex and vary from one district to the next and from one building to another within districts. If the district is quite sure it will not need or want the facility in the near future and/or it needs the cash from the facility, the best option is to sell if a suitable buyer can be found.

If the district is quite sure future use will be made of the building, but no immediate and profitable use can be found, the building can be "mothballed." Districts should, however, consider the difficulty of maintaining a "mothballed" building and whether or not the educational programs of the future will fit in the existing structure.

To safeguard against the possible disposal of a building which will be needed in the future and still keep the building from being a financial liability, many districts are renting or leasing facilities. If the district does not need to make money on the rental of the facility, the space can be rented or leased to another com-

munity agency at a token fee. Since the taxpayers already own the building, the only real concern is that it not be a liability to the district.

If the major concern is to obtain revenue from the space, more lucrative options need to be considered. Appendix E and F contain samples of policies and procedures regarding the renting of school space.[12] The procedures for renting and the policies and considerations should be carefully worked out to meet the needs and schedules of each district. Great care should be taken to assure the compatibility of tenants with the school program if the rental space is in an operating school facility. If the tenant is not in a building with an on-going educational program, procedures to assure compatibility among tenants and between tenants and the community are also important.

The final step then becomes the finding of the appropriate use for the building or space. The options are many. Only a few of the possible uses can be touched on in this paper.

With more women working outside the home, the need for preschool child care programs is greater than ever before. Elementary school facilities adapt well for nursery school and day care program use. Another increasing need is for "latch-key" programs which provide child care for school age children before and after school to fit the family's work schedule. Elementary school space is perfect in this situation because it eliminates the need to transport the

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[12]Madison Public Schools, Report of the Task Force on Declining Enrollment, (Madison, Wisconsin: Madison Public Schools, 1975.)

student to and from a day care facility. In some cases, breakfast can even be provided and the school cafeteria and food service staff can be utilized under different funding to accomplish this purpose. Most of these programs can be financed at least in part by community education funds (which are subsidized by the State of Minnesota) and many programs are self supporting through a fee charged per meal and per hour of care.

Adult education and recreation is becoming increasingly popular. Americans are discovering that learning is a useful and rewarding way to spend their leisure time. Adult education classes offer opportunity to develop hobbies, talents and skills in vocational areas. The potential for the use of school facilities for adult education and recreation is only beginning to be realized.

Tied closely to adult education are the vocational-technical education needs of our society. Several vocational-technical facilities have recently opened in the Minneapolis-St. Paul area. As the demand for vocational-technical education grows, it may be met by offering the courses at the local high school in the space no longer needed by the declining high school population.

Expanded college programs are also in the area of adult education. Colleges are setting up extension programs or branches which offer college credit programs. Such programs can eliminate the need for more construction on the college campuses and also eliminate the inconvenience of commuting for many people.

The area of human services may be one of the fastest growing needs in our society today. Communities are becoming aware of the great needs to be met and are offering more and more programs.

Recreation programs have been the forerunners in community service programs and often fit well into school facilities. Senior high facilities offer more variety for these than elementary buildings. Some of the newer programs include chemical dependency clinics, teen centers, free health clinics, food shelves and day activity centers.

The whole area of senior citizen services has expanded greatly and probably will continue to do so as people retire during healthy and active years. Activity centers, social and recreation space, dining facilities and even residential facilities for the elderly are all possible uses for school space.

Many areas of special interest exist. Schools have been converted to museums, art institutes, theatres, music halls and libraries.

As the private schools expand, they tend to be more in need of quality space and may be likely buyers for the facilities available in the public school district. More and more private schools for special learning disabilities are starting and will need space.

Special education programs in the public schools are also expanding and are often in cooperative ventures because of the special program needs for staff and facilities and because of the low-incidence of any one type of handicap within a district. Cooperative ventures for planning, research, special services, vocational-technical training, special education programs, emotionally handicapped and physically handicapped treatment programs are now a reality and generally are housed in school district facilities.

In the past, unused school space has traditionally been used for non-profit, governmental or community service kinds of activities.

With more and more space becoming available, schools need to look toward private enterprise as potential buyers of or users of school facilities. Elementary facilities can be easily adapted into office facilities and training centers for industrial and business firms. Secondary facilities hold potential for convention centers and motel complexes. Most schools could be converted to residential training or treatment centers. Converting school space to apartments, nursing homes, or other group residential facilities is another possibility.

The architecture of the building, the location, the grounds and parking, as well as the special facilities available will all have to be considered and carefully matched with the use. Some facilities are more rigid in their adaptability than others, but with the proper amount of imagination and the right match of facility with tenant or buyer need, good use can be made of the surplus school facilities.

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APPENDIX A

FREQUENCY DISTRIBUTION OF GRADES HOUSED BY FACILITIES

Grades Housed	Number of Buildings	Percent of Total
K only	1	.2
K-1	2	.3
K-2	4	.7
K-3	9	1.5
K-4	6	1.0
K-5	24	4.0
K-6	257	42.5
K-7	2	.3
K-8	1	.2
K-12	5	.8
1-3	2	.3
1-5	3	.5
1-6	9	1.5
1-7	1	.2
2-3	1	.2
2-6	1	.2
3-6	4	.7
4-5	1	.2
4-6	8	1.3
5-7	1	.2
5-8	4	.7
6-8	4	.7
6-9	7	1.2
7-8	4	.7
7-9	69	11.4
7-12	8	1.3
8	1	.2
8-9	1	.2
8-12	1	.2
9-12	17	2.8
10-12	49	8.1
11-12	1	.2

APPENDIX A (cont.)

FREQUENCY DISTRIBUTION OF GRADES HOUSED BY FACILITIES

Grades Housed	Number of Buildings	Percent of Total
Leased	7	1.2
Anticipated Closing	22	3.6
Special Education Only	10	1.7
None	50	8.3
Preschool Only	1	.2
Closed	6	1.0
TOTAL	604	100.0

APPENDIX B

SUMMARY OF CONDITION OF EXISTING FACILITIES
BY DATE ERECTED

Condition	Count / Row Pct / Col Pct / Tot Pct	Erected 1884-1940	1941-1959	1960-1968	1969-1979	Not Specified	Row Total
Excellent		17	80	155	86	0	338
		5.0	23.7	45.9	25.4	0	55.9
		10.4	49.7	82.0	94.5	0	
		2.8	13.2	25.6	14.2	0	
Good		70	74	33	4	0	181
		38.7	40.9	18.2	2.2	0	29.9
		42.9	46.0	17.5	4.4	0	
		11.6	12.2	5.5	.7	0	
Fair		59	6	1	0	0	66
		89.4	9.1	1.5	0	0	10.9
		36.2	3.7	.5	0	0	
		9.8	1.0	.2	0	0	
Poor		12	0	0	0	0	12
		100.0	0	0	0	0	2.0
		7.4	0	0	0	0	
		2.0	0	0	0	0	
Other		5	1	0	1	0	7
		71.4	14.3	0	14.3	0	1.2
		3.1	.6	0	1.1	0	
		.8	.2	0	.2	0	
Not Specified		0	0	0	0	1	1
		0	0	0	0	100.0	.2
		0	0	0	0	100.0	
		0	0	0	0	.2	
	Column Total	163	161	189	91	1	605
		26.9	26.6	31.2	15.0	.2	100.0

APPENDIX C

SUMMARY OF CONDITION OF EXISTING FACILITIES BY USE

COUNT / ROW PCT / COL PCT / TOT PCT	1.ELEMEN	2.MIDDLE	3.JUNIOR	4.SENIOR HS	5.ADMIN OFFICES	6.WAREHOUS	7.OTHER	999999.Not Specified	ROW TOTAL
EXCELLENT	189	7	45	46	14	2	25	0	334
	56.9	2.1	13.5	13.8	4.1	.6	7.4	0	65.9
	57.3	43.8	55.6	68.7	73.7	50.0	35.7	0	
	32.9	1.2	7.4	7.6	2.4	.3	4.1	0	
GOOD	108	5	26	18	2	2	20	0	181
	59.7	2.8	14.4	9.9	1.1	1.1	11.0	0	34.9
	31.1	31.3	32.1	26.9	10.5	50.0	28.6	0	
	17.9	.9	4.3	3.0	.3	.3	3.3	0	
FAIR	34	3	7	3	3	0	15	0	65
	51.5	4.5	10.6	4.5	4.5	0	24.2	0	10.9
	9.8	18.8	8.6	4.5	15.8	0	22.9	0	
	5.6	.5	1.2	.5	.5	0	2.5	0	
POOR	3	0	2	0	0	0	7	0	12
	25.0	0	16.7	0	0	0	58.3	0	2.0
	.9	0	2.5	0	0	0	10.0	0	
	.5	0	.3	0	0	0	1.2	0	
OTHER	3	1	1	0	0	0	2	0	7
	42.9	14.3	14.3	0	0	0	28.6	0	1.2
	.9	6.3	1.2	0	0	0	2.9	0	
	.5	.2	.2	0	0	0	.3	0	
NOT SPECIFIED	0	0	0	0	0	0	0	1	1
	0	0	0	0	0	0	0	100.0	.2
	0	0	0	0	0	0	0	100.0	
	0	0	0	0	0	0	0	.2	
COLUMN TOTAL	347	16	91	67	19	4	70	1	595
	57.4	2.6	13.4	11.1	3.1	.7	11.6	.2	100.0

APPENDIX D

ALTERNATIVE USES
OF
SCHOOL FACILITIES

Housing, Community Programs (Non-profit)

Day Care Center
Pre-School Child Care Center
Senior Citizen Recreation Center
Senior Citizen Classes
Basic Education Center
Chemical Dependency Program
Latch Key Programs
Community Recreation Programs
Teen Counseling Center
Mental Health Clinic
Day Activity Center for Handicapped
Community Health Center
Battered Spouse Residence
Senior Citizen Center
Apartments for Handicapped
Cultural Arts Center
Community Theater
Local Community Heritage Center
Community Counseling Center
Legal Aid Center
Manpower Training Center/Job Corps

Educational (Non-profit)

Magnet School
Community Skill/Resources Center
Cooperative School Programs
Community Library
Special Education Center
Voc-Tech Center
Low Incidence Handicapped Programs
Music, Art, Dance, Drama Programs
Adult Education Center

Business and Commercial (Profit)

Office Space
Shopping Center
Convention Center
Motel Complex
Apartments
Nursing Homes
Training Center for Business, Industry
Art Galleries
Music Schools
Craft and Hobby Center
Health Spa

APPENDIX E

RENTAL OF SURPLUS SPACE IN OPERATING SCHOOL BUILDINGS

I. Recommended Procedure for Rental of Space

A. Annually in the Fall or at other appropriate times, the Building Principal, Area Director and School Superintendent will jointly identify and declare the amount of surplus space available in a school building, and the duration for which such space can be rented.

B. The Building Principal will complete a surplus space form prepared by the Real Estate Division of the Department of Administration and transmit it to the Director of Business Services of Public Schools. The Director of Business Services will serve as the liaison for the school administration and will work jointly with the Real Estate Division in the rental of space. (For further information on types of requested information on surplus form, see IV below.)

C. The Building Principal will inform parents and neighborhood groups via the school newsletter about the declaration of surplus spaces, their potential rental, and the possible compatible tenants. Any comments received from parents and neighborhood organizations will be forwarded by the Building Principal to the Director of Business Services.

D. The Director of Business Services will transmit the completed surplus space form to the Real Estate Division and also will authorize the Division to seek prospective tenants for rental of surplus spaces.

E. Based on a list of compatible tenants and specific criteria submitted by the school administration, the Real Estate Division will attempt to rent the surplus spaces. In any rental consideration, the public, quasi-public or institutional sector will be given first priority.

F. After finding a potential tenant(s), the Real Estate Division will consult with the Director of Business Services, who in turn will notify the Area Director and Building Principal about the tenant(s). A recommendation on the potential tenant(s) is made jointly by the Director of Business Services, Area Director, and Building Principal to the School Superintendent.

G. The School Superintendent will transmit personal recommendations on the tenant(s) and rental of surplus spaces to the Board of Education.

H. The Board will review and act upon the recommendations. Parents will be informed about the tenant(s) and rental of surplus space and will be afforded an opportunity to be heard before the Board takes action. The Board will approve all leases to tenants.

II. Compatibility Considerations of Potential Tenants

A. Must physical changes, such as renovations and remodelings, be made to accommodate the tenant(s), and what are the costs of the changes?

B. Will the tenant(s) be disruptive or distractive to the regular program, in terms of noise, traffic through common areas, etc.?

C. Will the tenant(s) be acceptable to the teaching staff and parents?

D. Will the tenant(s) cause transportation and parking problems?

E. What is the degree of supervision required of the building principal and are the tenants amenable to the authority of the principal?

III. Rental Rates and Rental Considerations

A. Develop inventory of all vacant surplus spaces.

B. Determine per square foot cost of surplus space in each school by including (1) administrative charge of building principal and secretary, (2) utilities, (3) custodial salaries, supplies and equipment, (4) repairs and replacements, and improvements and additions to building and site, all to be pro-rated over a 10-year period, and (5) Real Estate Division's service charges.

C. Calculate district average per square foot cost from pool of available surplus space.

D. Rental rate will be a "break-even" rate to cover operational costs.

IV. Types of Information Needed by Real Estate Division of Surplus Space

A. Location of surplus space (name of school and room number).

B. Amount of available surplus space (size and area in square foot).

C. Term or length of time surplus space will be available.

D. On-site parking privileges, including number of available parking spaces.

E. Accessibility to building during days, nights, and weekends.

F. Use of gymnasium and other facilities.

G. Availability of janitorial service.

H. Rental rate.

APPENDIX F

RENTAL OF SURPLUS SPACE IN DISCONTINUED SCHOOL BUILDINGS

I. Recommended Procedure for Rental of Space

A. After deciding to discontinue a building for public school use, the Board of Education will continue to retain control and administration of the building for 3 years as a transitional period to allow for a long-term determination as to whether such a building will be used again for public school use.

B. Following the Board's decision for discontinuance and rental of the building, the Director of Business Services of _____ will authorize the Real Estate Division of the _____ of Administration to rent the entire building. The Director of Business Services will transmit any pertinent data on the building to the Real Estate Division.

C. The Real Estate Division will attempt to rent the building to different tenants based on certain considerations, such as public and private restrictions, suitability of tenants' programs to one another and acceptability of tenants to neighborhood residents and organizations. Rental may be to a prime lessee with provisions for sub-leasing. In any rental consideration, the public, quasi-public or institutional sector will be given first priority.

D. After finding potential tenants, the Real Estate Division will consult with the Director of Business Services who in turn will notify the School Superintendent about the tenants.

E. The School Superintendent will transmit personal recommendations on the tenants and rental of spaces to the Board of Education.

F. The Board will review and act upon the recommendations. Any person desiring to be heard on the rental of space will be afforded such opportunity before the Board takes action. The Board will approve all leases of tenants.

G. Following a 3 year period and its determination that the discontinued school building will no longer be needed for public school use, the Board will declare the building surplus and offer it for sale. Because of the preference given to the public, quasi-public, and institutional sector in the rental of space, the sale of a school building will be in the following priority order: City of ____ or another municipality followed by a private purchaser.

II. Rental Rates and Rental Considerations

(See Appendix E page 2.)